



EXIM Online (EOL) Essentials:

An Introductory Guide for Exporters

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September 2017

Welcome to EXIM Online (EOL)

This document will help you to get started using our online application and policy management system. Basic tasks will be explained step-by-step, including creating a new EOL account, assigning a broker to your account and to an application, and where to get assistance.

What products are used on EOL?

- Multi-buyer insurance policies for exporters
 - Express Insurance
 - Small Business Multi-buyer (ENB)
 - Small Business Environmental (ENV)
 - Standard Multi-buyer (ESC)
- Exporter Single Buyer (ESS)
- Financial Institution Buyer Credit (FIBC)
- Bank Letter of Credit (ELC)
- Medium- term insurance
- Medium-term Bank Guarantee

What tasks can be performed on EOL?

- Exporter can assign a broker to their EOL account and a specific application
- Exporter/broker can complete an application for a new policy, or a Special Buyer Credit Limit (SBCL)
- View status of pending applications submitted to EXIM
- Accept a quote
- Pay premium
- View and print in-force policies and policy documentation
- Report shipments and overdues
- Broker can view all policies
- File a claim

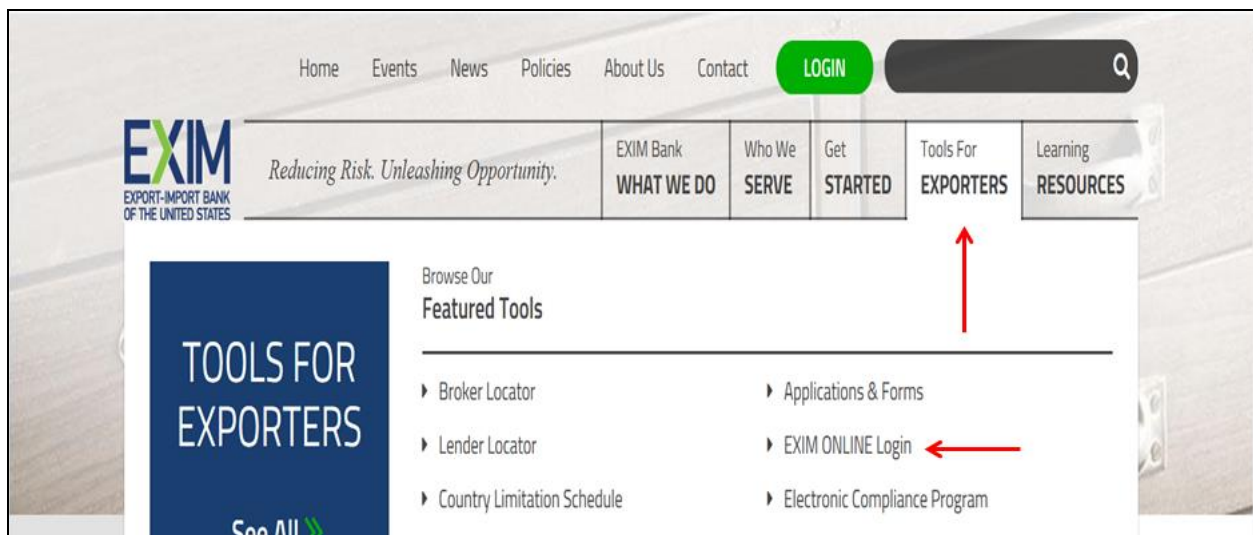
Best practices when using EOL

- We strongly advise against sharing and letting others use your User ID and password
 - EOL assumes the person entering information is the person to whom that User ID and password were issued
 - Sharing ID's and passwords can create confusion if there is a need to reconstruct somebody's activity in EOL

- EOL accounts cannot be deleted, but they can be deactivated to prevent someone from using them. They can also be reactivated if necessary. In both cases, the primary contact for the exporter should email BAPIMT@exim.gov with the appropriate request.
- If you have assigned your broker to your account in EOL (see instructions below), they will be able to access your information and help you manage your EOL account and complete applications

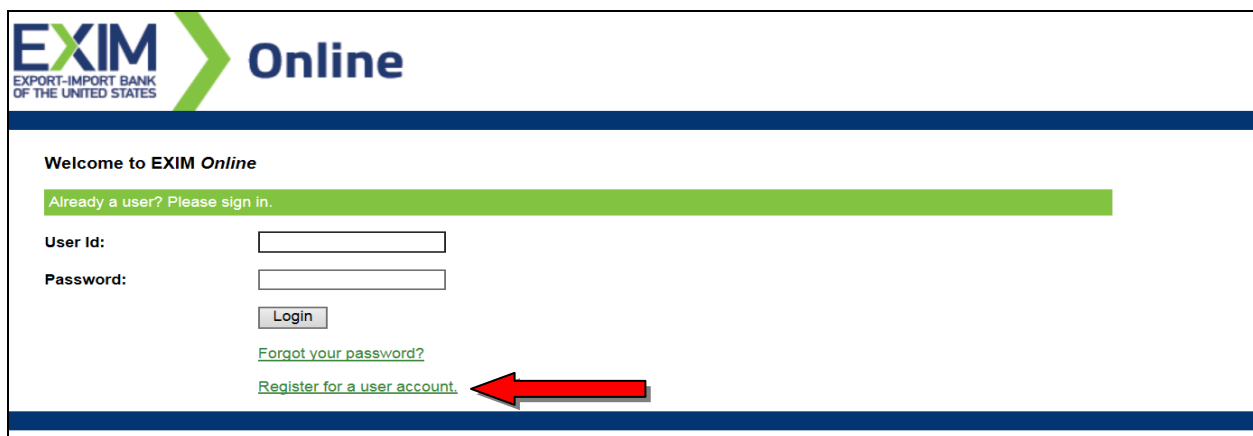
Where can I find EOL?

EOL is accessed via EXIM Bank's website www.exim.gov using the "Tools for Exporters" tab, or at <https://eximonline.exim.gov>.

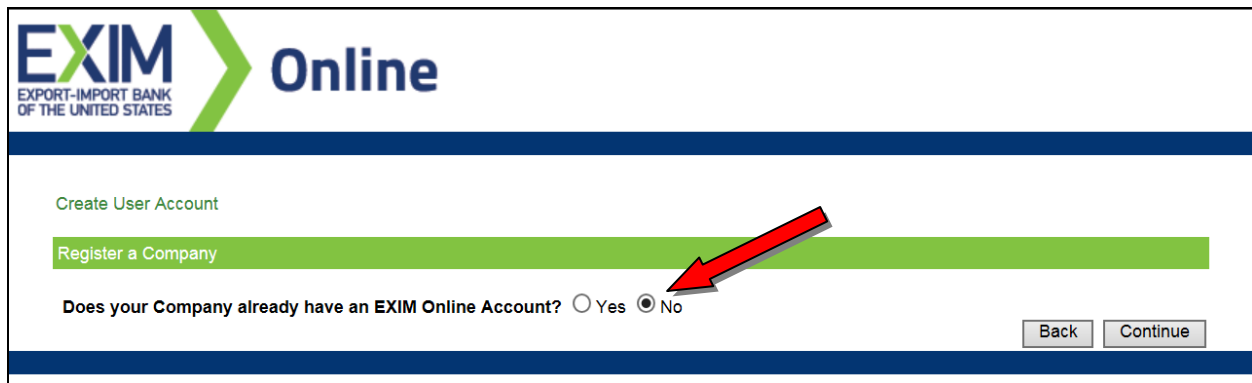


How do I get an EOL account?

1. To open an EOL account, find the EXIM Online link on EXIM's webpage (see above) and click on "Register for a user account", after which you will be prompted to accept the terms of use. You will need your company's DUNS number and primary NAICS code.



2. If your company is new to EOL, answer “No” to the question “Does your Company already have an EXIM Online Account?”



EXIM
EXPORT-IMPORT BANK
OF THE UNITED STATES

Online

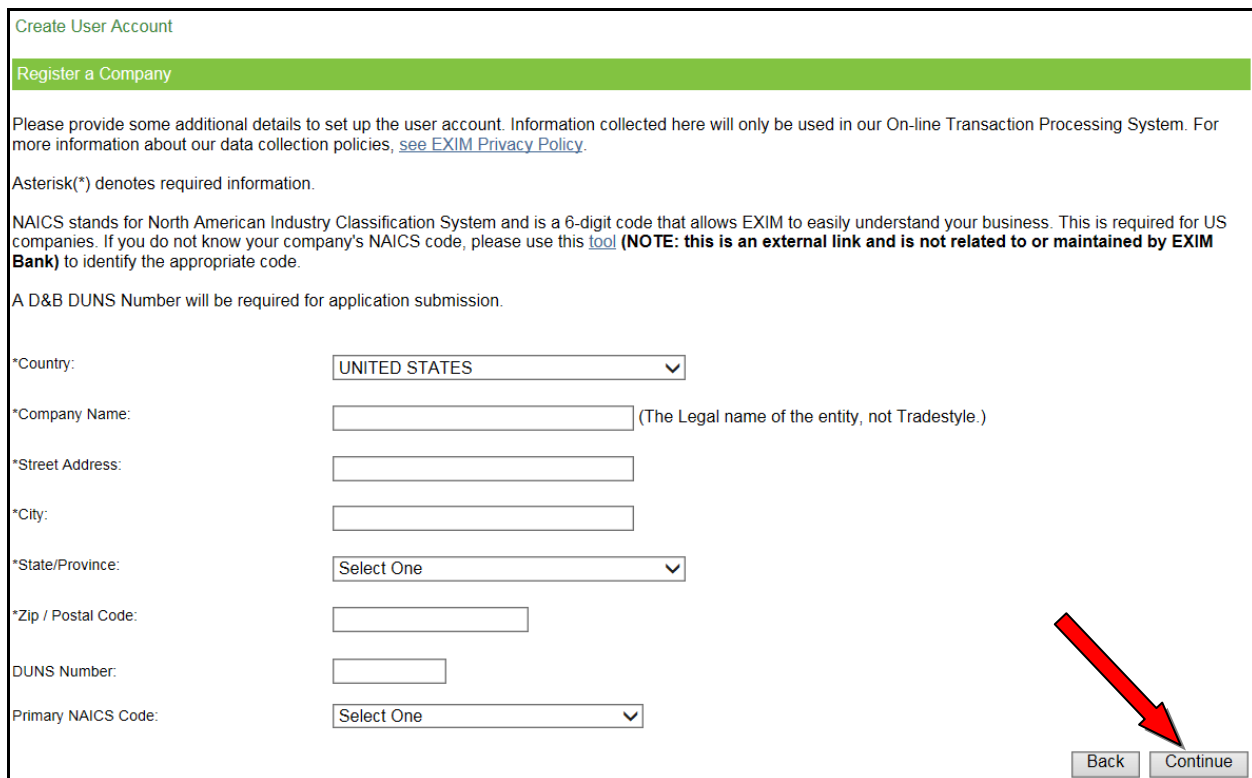
Create User Account

Register a Company

Does your Company already have an EXIM Online Account? ☐ Yes ☒ No

Back Continue

3. Complete the details for your EOL profile and click “Continue”.



Create User Account

Register a Company

Please provide some additional details to set up the user account. Information collected here will only be used in our On-line Transaction Processing System. For more information about our data collection policies, [see EXIM Privacy Policy](#).

Asterisk(*) denotes required information.

NAICS stands for North American Industry Classification System and is a 6-digit code that allows EXIM to easily understand your business. This is required for US companies. If you do not know your company's NAICS code, please use this [tool](#) (NOTE: this is an external link and is not related to or maintained by EXIM Bank) to identify the appropriate code.

A D&B DUNS Number will be required for application submission.

*Country: UNITED STATES

*Company Name: (The Legal name of the entity, not Tradestyle.)

*Street Address:

*City:

*State/Province: Select One

*Zip / Postal Code:

DUNS Number:

Primary NAICS Code: Select One

Back Continue

4. You will then be prompted to enter contact details, and select a user ID, password, and challenge question. Then press “Continue”. This person will be the “Primary Contact” for your company for all general correspondence. Your company can change the primary contact by calling the Credit Applications & Processing Division at (202) 565-3800. Do not use your broker’s contact details.

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Enter User Information

Provide some additional details to set up the user account. Please note that the information collected here will only be used in our On-line Transaction Processing System. For more information about our data collection policies, [see EXIM Privacy Policy](#).

Note: Asterisk(*) denotes required information.

*User ID:	<input type="text"/>	User ID can only contain characters from the following four groups: <ul style="list-style-type: none">o English uppercase characters (A through Z)o English lowercase characters (a through z)o Numerals (0 through 9)o Non-alphabetic characters: hyphen (-), period (.) and underscore (_)
*Password:	<input type="password"/>	Password should conform to the below guidelines: <ul style="list-style-type: none">- Must be at least 8 characters long.- Must contain at least 1 character from each of the following four character groups:<ul style="list-style-type: none">o English uppercase characters (A through Z)o English lowercase characters (a through z)o Numerals (0 through 9)o Non-alphabetic characters (such as ~, !, @, #, \$, %, ^, &, *, (,), -, _ , +, =, {, }, [,] , ; , : , < , > , / , ?)- Must not contain spaces.- Must not be the same as the User ID.
*Re-enter Password:	<input type="password"/>	
*First Name:	<input type="text"/>	
*Last Name:	<input type="text"/>	
*Title:	<input type="text"/>	
*Phone:	<input type="text"/>	
*Email:	<input type="text"/>	
*Challenge Question:	<input type="text" value="Select One"/>	Please select a "challenge" question and response and we'll use this to verify your identity when you call in to EXIM offices for your password.
*Challenge Response:	<input type="text"/>	

Remember to always protect your userid and password from unauthorized use.

5. You will then receive a confirmation indicating that the user account was created and that a confirmation email has been sent. Record your User ID and password in a safe location. You may then proceed to log in to the new account.

EXIM Online
EXPORT-IMPORT BANK
OF THE UNITED STATES

Create User Account

User Profile Confirmation

The User Account was created successfully. A confirmation email has been sent to the email address provided while registering the account. You may Login with the new User ID or go to the main [EXIM](#) website.

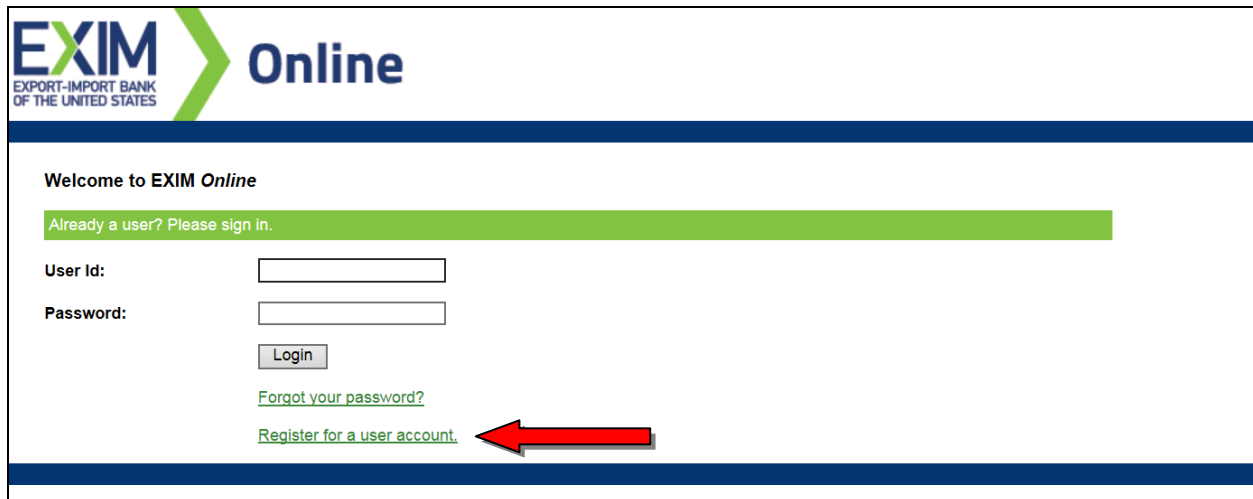
Creating additional exporter user accounts

Additional user accounts for your company can be created so multiple people can access EOL. Those additional users will need your company's registration number, which was created when your company first set up an account in EOL. The person designated by your company as its "Primary Contact" can find the registration number in his/her EOL account under the "My

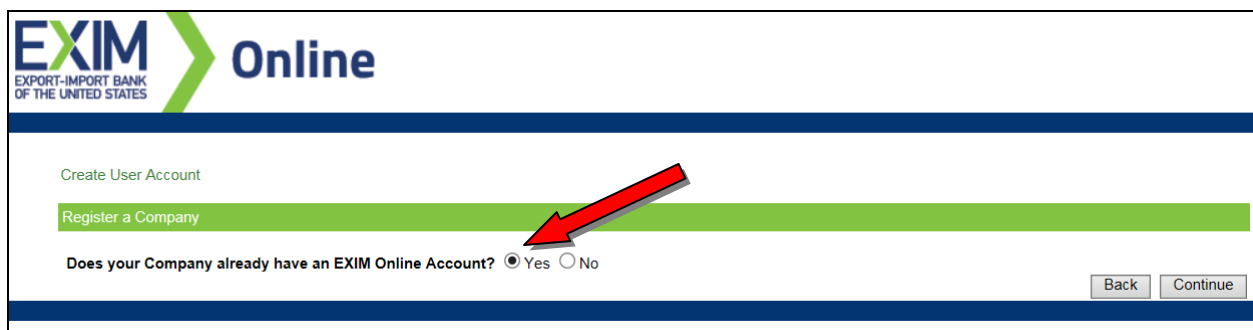
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Company Profile” link on your company’s landing page. Record the registration number and keep it in a safe location in case you get locked out of your EOL account or need to re-set your password.

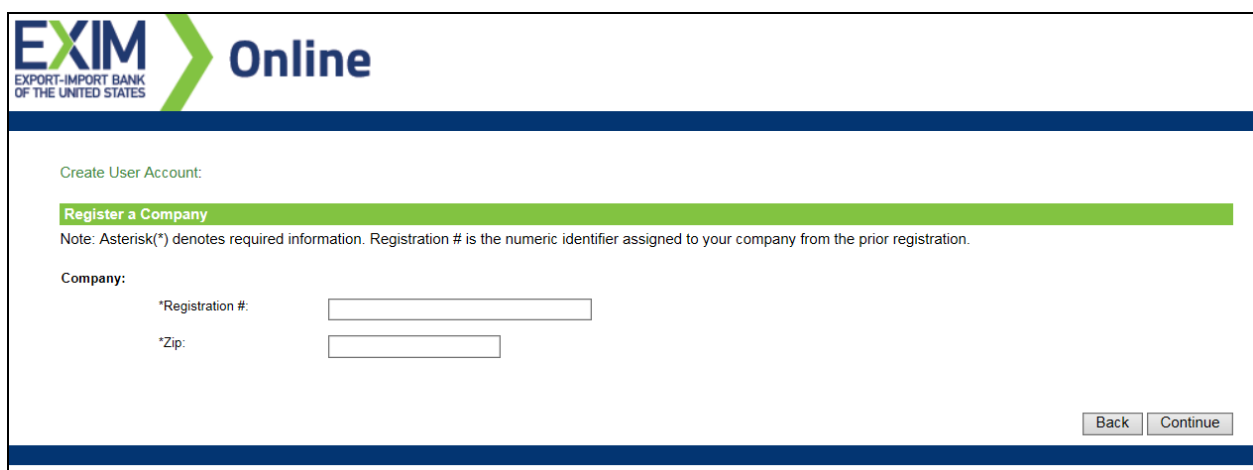
1. To set up additional users, click on the “Register for a user account” link after which you will be prompted to accept the terms of use.



2. Since your company already has an EOL account, you should answer “Yes” to the question “Does your Company already have an EXIM Online Account?”

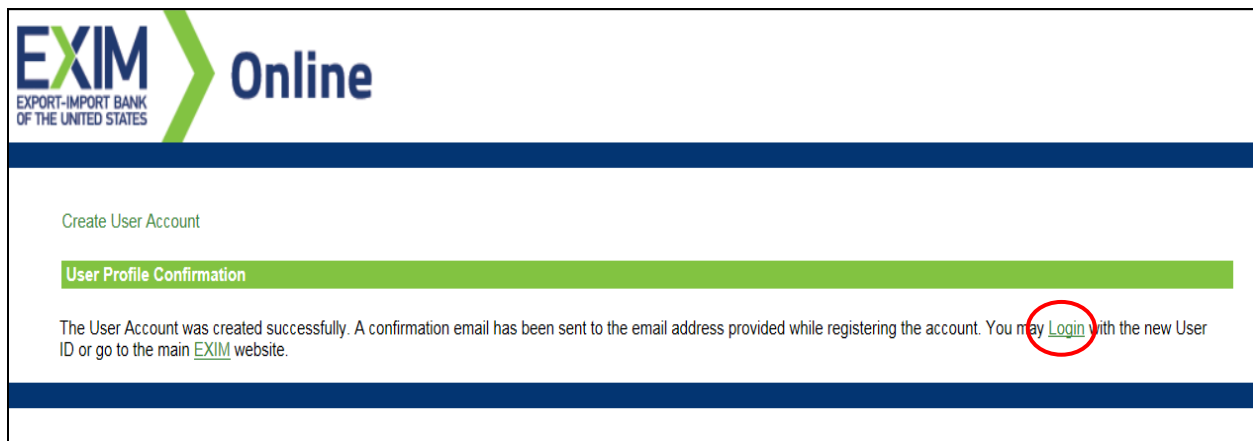


3. Enter your company’s registration number and zip code.



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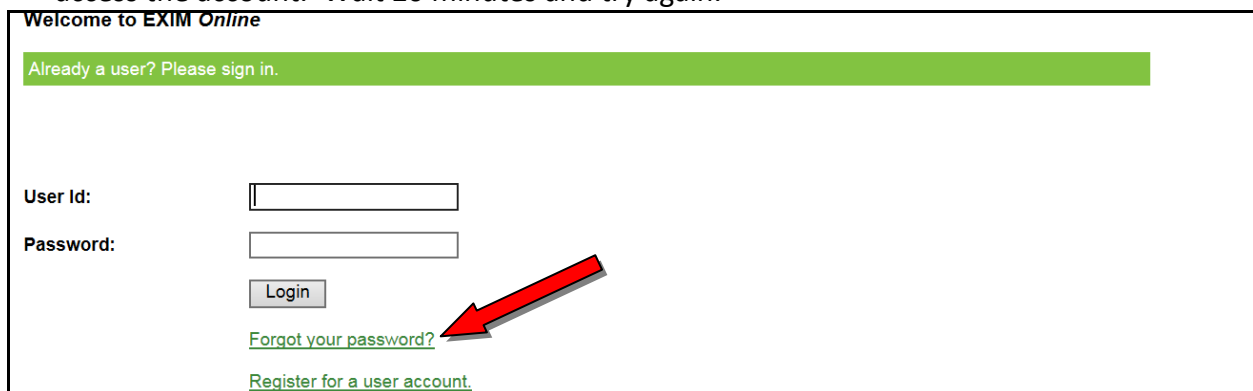
4. You will then be prompted to enter contact details, and select a User ID, password, and challenge question as per the previous instructions. Then press "Continue". You will receive a confirmation that the user account was created and that a confirmation email has been sent. You may then proceed to log in to the new account.



The screenshot shows the EXIM Online interface. At the top is the EXIM logo with the text "EXPORT-IMPORT BANK OF THE UNITED STATES" and a green arrow pointing right, followed by the word "Online". Below this is a green bar with the text "Create User Account". Underneath is a green bar with the text "User Profile Confirmation". The main content area contains the text: "The User Account was created successfully. A confirmation email has been sent to the email address provided while registering the account. You may [Login](#) with the new User ID or go to the main [EXIM](#) website." The word "Login" is circled in red.

What if I forget my User ID or password, or get locked out of my account?

1. If you forget your User ID, send an email to BAPIMT@exim.gov with your name, your company's name, and your email address and ask to have your User ID emailed to you.
2. If you forget your password, from the log-in page, click on the link "Forgot your password?" Enter your User ID and email address to receive an email with a link to re-set your password. Before you can re-set your password, you will be asked to answer the challenge question you established when you first created your account. If you cannot answer your challenge question, send an email to BAPIMT@exim.gov.
3. **NOTE:** You will be temporarily locked out of your account after three failed attempts to access the account. Wait 20 minutes and try again.



The screenshot shows the EXIM Online login page. At the top is the text "Welcome to EXIM Online". Below this is a green bar with the text "Already a user? Please sign in." Underneath are two input fields: "User Id:" and "Password:". Below the "Password:" field is a "Login" button. Below the "Login" button are two links: "[Forgot your password?](#)" and "[Register for a user account.](#)". A red arrow points to the "Forgot your password?" link.

Appointing a broker to your account

Before a broker can assist you with an application in EOL, you need to appoint the broker to your account. This can be done in two ways. The first way is for your company to make a

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general appointment of the broker as discussed below in this section. The second way is for your company to appoint the broker to a specific application as discussed in the next section.

1. From your landing page click on the “Maintain Broker” link.

The screenshot shows the EOL landing page with two main columns. The left column, titled 'Act / Manage Transactions', contains links under 'Act' (Apply for a Letter of Interest, Apply for Insurance Policy or Medium-term Guarantee, Act on Quote, Apply for Special Buyer Credit Limit (SBCL), Apply for Issuing Bank Credit Limit (IBCL), Continue a Saved Application, Continue a Saved Claim) and 'Manage' (Amend a Policy or Guarantee, Assign Insurance Policy Proceeds, Report Shipments, Make A Payment, Report Overdues, File a Claim, Request a Disbursement Approval, Maintain Letters of Interest). The right column, titled 'Monitor Portfolio', contains links under 'My Portfolio' (Pending Applications, Pending Claims, Insurance In Force/Recently Expired Policies, Insurance Policy Assignments, Authorized + Non-Operative Guarantees, Operative Guarantees, Search Portfolio) and 'Miscellaneous' (Historical Transactions, My Company Profile, Maintain Broker). A red arrow points to the 'Maintain Broker' link in the Miscellaneous section.

2. Open the drop-down box and select your broker from the list, and click on “Add Broker”. The broker will now appear on the list of brokers already associated with your EOL account (if any). The broker will now be able to initiate applications for you in EOL. You can view and remove a broker by clicking on the appropriate links.

The screenshot shows the 'View Broker' page. At the top, there's a green header 'View Broker'. Below it, a dropdown menu 'Select New Broker from List:' is highlighted with a red circle. To the right of the dropdown are 'Back' and 'Add Broker' buttons. Below these is a section 'Select to view or remove associated brokers'. It shows 'One item found.' and a table with one row. The table has columns: Name, City, State, Type, View, and Remove. The row contains 'Test Broker', 'Rockville', 'Maryland', 'BROKER', and links 'View' and 'Remove'. A red arrow points from the dropdown menu to the 'Add Broker' button. Another red circle highlights the 'View' and 'Remove' links in the table.

Name	City	State	Type	View	Remove
Test Broker	Rockville	Maryland	BROKER	View	Remove

Associating a broker with a specific insurance application

The second way to appoint a broker to your account is by associating them with a specific application for insurance.

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1. Initiate the application from your landing page by clicking on “Apply for Insurance Policy or Medium-term Guarantee”.

The screenshot shows the Exim Online (EOL) landing page. It is divided into two main columns. The left column is titled 'Act / Manage Transactions' and contains two sections: 'Act' and 'Manage'. The 'Act' section lists several links: 'Apply for a Letter of Interest', 'Apply for Insurance Policy or Medium-term Guarantee' (highlighted with a red arrow), 'Act on Quote', 'Apply for Special Buyer Credit Limit (SBCL)', 'Apply for Issuing Bank Credit Limit (IBCL)', 'Continue a Saved Application', and 'Continue a Saved Claim'. The 'Manage' section lists: 'Amend a Policy or Guarantee', 'Assign Insurance Policy Proceeds', 'Report Shipments', 'Make A Payment', 'Report Overdues', 'File a Claim', 'Request a Disbursement Approval', and 'Maintain Letters of Interest'. The right column is titled 'Monitor Portfolio' and contains a 'My Portfolio' section with links: 'Pending Applications', 'Pending Claims', 'Insurance In Force/Recently Expired Policies', 'Insurance Policy Assignments', 'Authorized + Non-Operative Guarantees', 'Operative Guarantees', and 'Search Portfolio'. Below this is a 'Miscellaneous' section with links: 'Historical Transactions', 'My Company Profile', and 'Maintain Broker'.

2. Select the type of policy from the drop-down menu and click “Continue”. This will take you to the instructions page for the application.

The screenshot shows the 'New Application' page in Exim Online. At the top, there is a header with the EXIM Online logo, build version, and deployment date. Below the header, there is a 'Test Company' section with business address and primary contact information. The main section is titled 'New Application' and contains a message: 'Please select the type of product you wish to apply for and click Continue. The Customer Service tab above has links to additional information that can help you fill out the on-line application forms. Please review these pages, if necessary.' Below this message is the 'Application Type' drop-down menu, which is open and shows the following options: 'Letter of Credit Insurance', 'Exporter Single-Buyer Insurance', 'Financial Institution Buyer Credit Insurance', 'Short-Term Multi-Buyer Insurance', and 'Medium Term Insurance or Guarantee'. A red arrow points to this menu. At the bottom right, there are 'Back' and 'Continue' buttons.

3. The location of the link to appoint a broker for the application depends on the type of policy.

For Express Insurance:

- a) Select “Short-Term Multi-Buyer Insurance” as above and then “Start Express Application”.

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Exporter:
Test Company

OMB No. 3048-0023, EIB 92-50, Expires 06/30/2019

Multi-Buyer Application Selection

If you need assistance with this application, please contact EXIM Bank (1-800-565-3946) or your insurance broker.

EXPRESS INSURANCE POLICY	OTHER MULTI-BUYER INSURANCE POLICIES
Fact Sheet	Fact Sheet
<ul style="list-style-type: none">• if you have ten (10) or fewer foreign buyers; and• prefer EXIM Bank to approve all required buyer credit limits and assist you to obtain buyer credit information; and• you are a "small business" by SBA standards; and• with your affiliates, you averaged \$7,500,000 or less in annual export credit sales over the last three (3) years <p>(\$7,500,000 annual average excludes sales to Canada and those on letter of credit or sight payment terms)</p>	<ul style="list-style-type: none">• if you have any number of foreign buyers; and• prefer to self-approve some or most buyer credit limits; and• you are a small, medium or large business
Start Express Application	Start Other Multi-Buyer Application

b) To access the link to assign a broker, click either "Continue" or the "Company Info" link.

Home Customer Service

Exporter:
Test Exporter - 477 Testing

Express Insurance Application
Application Instructions | Application Summary
OMB No. 3048-0023, EIB 10-02, Expires 06/30/2019

Tracking #: 664082

Introduction

To complete this application you will need you:

- 1) Most recent fiscal year financial statements.
- 2) Total export credit sales and write-offs for the last three years.
- 3) Accounts receivable aging, dated within 30 days of the application date.
- 4) Complete name(s) and address(es) of buyer(s) for which credit indications are requested with this application.

*** Important *** - The Buyer and End User must be foreign entities in countries for which EXIM is able to provide support, see EXIM's [Country Limitation Schedule](#).

A **Preview** of the application process is available in this [video](#). Please use the **Right Navigation Area** to easily move to specific sections of this application. Just point and click on the section you wish to access. When each section is marked with a "v" you may **Submit** the application for processing.

At any time during the application process, you may click on the "Save and Exit" button to save the information you have entered and exit the On-line Transaction Processing System. Log back in any time to enter more information and/or submit the completed application.

This system will also allow you to **Upload** copies of credit information you wish to include in your application as well as **Print** a copy of the application for your records by clicking on the "Application Summary" link at the top of the page.

Decisions: Upon submission, a tracking number will be provided allowing you to track the application's progress.

For **Help**, contact your insurance broker - or - call 1-800-565-3946 (press#2 at the greeting) to be connected to your nearest EXIM Bank Regional Office.

If this application has not been submitted within 90 days of its initiation it will be removed from the system.

[Done](#) [App. Section](#)

- [Company Info](#)
- [General Questions](#)
- [Products](#)
- [Export Credit Experience](#)
- [Financial Highlights](#)
- [Buyer Credit Request\(s\)](#)
- [Attachments & Comments](#)
- [Submit](#)

[Back](#) [Continue](#)

c) Select the broker from the drop-down list of all registered brokers, and click "Save and Exit". That broker is now associated with your company's account, and will have access to the application in EOL. Note that you will be offered the option of granting a financial institution and/or a City/State Partner (now called a Regional Export Promotion Program (REPP) participant) view-only access to the application. Do not select either of these unless you want the organization to have access to your application. They can be added later.

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Application Primary Contact: The individual responsible for all correspondence specifically related to this transaction. You can choose from the existing contacts already on file (if any) OR add a new contact by picking the "Add New Contact" option.

Contacts on file:

Mr. John Smith - (123) 456-7890

*Prefix

☒ Mr. ☐ Mrs. ☐ Ms.

*First /Last Name:

John / Smith

*Title:

President

*Email:

john.smith@littlebrother.com

*Phone / Fax (optional):

(123) 456-7890

Broker: Please select a broker if you are working with an insurance brokerage. Broker will have full access rights (view and enter data) to this application.

-Please select-

Financial Institution: Please select a Financial Institution (view access only)

-Please Select-

City/State: Please select an EXIM Bank export promotion City/State Partner(view access only)

-Please Select-

Do not select either of these unless you want the organization to have access to your application. You may want to use this option if you assign your policy proceeds to a financial institution.

Save & Exit

Continue

For other Multi-Buyer (ENB), Single Buyer (ESS), Financial Institution Buyer Credit (FIBC), and Medium-Term policies:

- a) After selecting one of the policy types as shown earlier, select the "Access Rights" link.

Home Customer Service

Exporter: Test Exporter - 477 Testing

Multibuyer Insurance Application
OMB No. 3045-0023, EIB 92-50, Expires 06/30/2019

Tracking #: 664219

Introduction [Need help?](#)

To complete this application you will need your:

- 1) Most recent fiscal year financial statements.
- 2) Total export credit sales and write-offs for the last three years.
- 3) Accounts receivable aging, dated within 30 days of the application date.

*** Important *** - The Borrower, Guarantor, Buyer and End User must be foreign entities in countries for which EXIM is able to provide support, see EXIM's [Country Limitation Schedule](#).

Please use the **Right Navigation Area** to easily move to specific sections of this application. Just point and click on the section you wish to access. When each section is marked with a "✓" you may **Submit** the application for processing.

At any time during the application process, you may click on the "Save and Exit" button to save the information you have entered and exit the On-line Transaction Processing System. Log back in any time to enter more information and/or submit the completed application.

This system will also allow you to **Upload** copies of credit information you wish to include in your application as well as **Print** a copy of the application for your records by clicking on the "Application Summary" link at the top of the page.

Decisions: Upon submission, a tracking number will be provided allowing you to track the application's progress.

TO START: Click on "Continue" below

For **Help**, contact your insurance broker -or- call 1-800-565-3946 (press#2 at the greeting) to be connected to your nearest EXIM Bank Regional Office.

If this application has not been submitted within 90 days of its initiation it will be removed from the system.

Back Continue

Done App. Section

- Instructions
- Company Info.
- Access Rights
- General Questions
- Products
- Export Portfolio
- Affiliates
- Export Credit Experience
- Financial Statements
- Decision Makers
- Export Receivables
- Overdue Receivables
- Exclusions
- Special Coverages
- Comments
- Attachments
- Application Summary
- Submit

- b) Select the broker from the drop-down list of all registered brokers, and click "Save and Exit". That broker is now associated with your company's account, and will now have access to the application in EOL. Note that you will be offered the option of granting a financial institution and/or a City/State Partner (now called a Regional Export Promotion Program (REPP) participant) view-only access to the application. Do not select either of

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these unless you want the organization to have access to your application. They can be added later.

Exporter: **Test Exporter - 477 Testing** Multibuyer Insurance Application
OMB No. 3048-0023, EFB 92-50, Expires 06/30/2019 Tracking #: 664219

Access Rights to your Application [Need help?](#)

If you are working with an insurance brokerage, they will have full access rights (view and enter data) to this application.

Financial institutions or EXIM Bank export promotion City/State Partners are normally restricted to view only. To add "enter data" rights to either, you must un-click the "restrict to view only" button.

Only you can submit your application.

Broker used:

☒ None
☐ Select from Brokers Associated with this Company
-None Currently Associated-
☐ Select New Broker from List
-Please Select-

Financial Inst. used:

☒ Restrict to 'View Only'
☐ None
☐ Select from Financial Inst. Associated with this Company
-Please Select-
☐ Select New Institution from List
-Please Select-

City / State Partner used:

☒ Restrict to 'View Only'
☐ None
☐ Select City / State Partner from List
-Please Select-
☐ Select New City/State from List
-Please Select-

Do not select either of these unless you want the organization to have access to your application. You may want to use this option if you assign your policy proceeds to a financial institution.

Back Save and Exit Continue

Exporter landing page

The first screen that you will see after logging on to EOL is your landing page. It is divided into four sections grouped by related functionalities as described below. The "Registered Users" link under Miscellaneous will only appear if the user is the designated Primary Contact for the company. Only the Primary Contact may view a list of all registered EOL users with that company. The Primary Contact will be notified when a new user has been registered.

Test Exporter - 477 Testing

Business Address: 6510 Tilden Ln, Rockville, MD 20852-3745

Primary Contact: Ed Coppola (202) 565-3129 exo_deadletter@exim.gov

Act / Manage Transactions

Act

- [Apply for a Letter of Interest](#) *What's New - Some he*
- [Apply for Insurance Policy or Medium-term Guarant](#)
- [Act on Quote](#)
- [Apply for Special Buyer Credit Limit \(SBCL\)](#)
- [Apply for Issuing Bank Credit Limit \(IBCL\)](#)
- [Continue a Saved Application](#)
- [Continue a Saved Claim](#)

Manage

- [Amend a Policy or Guarantees](#)
- [Assign Insurance Policy Proceeds](#)
- [Report Shipments](#)
- [Make A Payment](#)
- [Report Overdues](#)
- [File a Claim](#)
- [Request a Disbursement Approval](#)
- [Maintain Letters of Interest](#)

Monitor Portfolio

My Portfolio

- [Pending Applications](#)
- [Pending Claims](#)
- [Insurance In Force/Recently Expired Policies](#)
- [Insurance Policy Assignments](#)
- [Authorized + Non-Operative Guarantees](#)
- [Operative Guarantees](#)
- [Search Portfolio](#)

Miscellaneous

- [Historical Transactions](#)
- [My Company Profile](#)
- [Registered Users](#)
- [Maintain Broker](#)

Apply for insurance, credit limits, guarantees, Letter of Interest; continue a saved application or claim

View submitted applications and claims, in-force policies; search all activities

Policy maintenance (amend; assign; report shipments; pay premium; file claim)

View returned, withdrawn cancelled, denied, expired transactions; add/change broker

Adding or changing a broker on an existing policy

You can add a broker to an existing policy if you were not using one at the time a policy was issued. You can also change a broker after a policy is issued, in which case the existing broker will receive a communication informing them of the change. A policy must be amended to add or change a broker.

1. From the landing page, click “Amend a Policy or Guarantee”.

The screenshot shows the Exim Online landing page. It is divided into two main columns: 'Act / Manage Transactions' and 'Monitor Portfolio'.

Act / Manage Transactions

Act

- [Apply for a Letter of Interest](#)
- [Apply for Insurance Policy or Medium-term Guarantee](#)
- [Act on Quote](#)
- [Apply for Special Buyer Credit Limit \(SBCL\)](#)
- [Apply for Issuing Bank Credit Limit \(IBCL\)](#)
- [Continue a Saved Application](#)
- [Continue a Saved Claim](#)

Manage

- [Amend a Policy or Guarantee](#) (indicated by a red arrow)
- [Assign Insurance Policy Proceeds](#)
- [Report Shipments](#)
- [Make A Payment](#)
- [Report Overdues](#)
- [File a Claim](#)
- [Request a Disbursement Approval](#)
- [Maintain Letters of Interest](#)

Monitor Portfolio

My Portfolio

- [Pending Applications](#)
- [Pending Claims](#)
- [Insurance In Force/Recently Expired Policies](#)
- [Insurance Policy Assignments](#)
- [Authorized + Non-Operative Guarantees](#)
- [Operative Guarantees](#)
- [Search Portfolio](#)

Miscellaneous

- [Historical Transactions](#)
- [My Company Profile](#)
- [Maintain Broker](#)

2. Select the policy you want to amend.

The screenshot shows the 'In Force Policies/Guarantees' section. At the top, there are links for 'Home' and 'Customer Service'. Below that, the company information for 'Test Company A' is displayed, including the business address and primary contact.

In Force Policies/Guarantees

One item found.

1

Items per page: 10 25 50 100

Number	Type	Insured/Guaranteed Lender	Buyer/Borrower Country	Country	Credit Limit
664094	ENB	Test Company A			100,000.00

A red arrow points to the 'Amend' button for policy 664094.

3. Click “Broker” among the amendment options on the right hand side of the screen.

The screenshot shows the 'Amend Policy' screen for policy # 664094. The left side contains instructions and a 'TO START' section. The right side has a 'Done' button and a list of 'Application Sections'.

Amend Policy

Amend Policy for Policy # 664094 :ENB

Insured: Test Company A

Point and click in the **right navigation bar** to access your requested amendment. At least one update to a section is required in order to submit the amendment application. For Deductibles and Premium Rate Amendment requests, contact your Relationship Manager.

At any time during the application process, you may click on the "Save and Exit" button to save the information you have entered and exit the On-line Transaction Processing System. Log back in any time to enter more information and/or submit the completed application.

This system will also allow you to **Attach** or **Upload** copies of credit information you wish to include in your application as well as **Print** a copy of the application summary for your records.

Decisions: This system will issue you a status notification upon submission of your amendment application request

TO START: Click on "Continue" below

For **Help**, contact your insurance broker -or- call 1-800-565-3946 (press#2 at the greeting) to be connected to your nearest EXIM Bank Regional Office.

If this application has not been submitted within 90 days of its initiation it will be removed from the system.

Application Sections

- [Insured Name](#)
- [Insured Address](#)
- [Primary Contact](#)
- [Broker](#) (indicated by a red arrow)
- [ExpirationDate](#)
- [Policy Payment Limit](#)
- [Deductible](#)
- [Cancel or Withdraw SBCL/IBCL](#)
- [DCL](#)
- [Advance Deposit](#)
- [Rate](#)
- [Products](#)
- [Exclusions](#)
- [Special Coverages](#)

4. Select the new broker from the dropdown list of brokers already associated with your company, or from the drop-down list of all EXIM registered brokers. You can review the change before submitting it by clicking "Application Summary". You may also add any comments by clicking "Comments". When you are finished, click "Submit".

Insured: **Test Company A** Policy Amendment Application Case #: 664432

Change Broker

Current Broker: Benecorp Inc.

Change Broker to:

☐ None

☒ Select from Brokers Associated with this Company

☐ Select New Broker from List: -Please Select-

Note: Your former Broker will be informed of this request of change in Broker.

Back Save and Exit Continue

Application Sections

Insured Name

Insured Address

Primary Contact

Broker

ExpirationDate

Policy Payment Limit

Deductible

Cancel or Withdraw SBCI/BCI

DCI

Advance Deposit

Rate

Products

Exclusions

Special Coverages

Affiliates

Other

Attachments

Comments

Application Summary

Submit

5. Confirm your request by clicking "Submit".

Insured: **Test Company B** Policy Amendment Application Case #: 664535

Submit

To submit the policy amendment requests, click the 'Submit' button below.

To save the amendment requests, and submit later, click the 'Save and Exit' button below.

Back Save and Exit Submit

6. Confirmation of the request will appear with a tracking number. You can print this page.

Insured: **Test Company A** Policy Amendment Application Case #: 664432

Submit - Tracking Sheet

This is your tracking sheet. Print this page and include a copy with any documentation that you send to EXIM Bank regarding this application.

Tracking #: 664432

Application Submittal Date: 09/07/2017

Applicant legal name: Test Company A

Applicant address: 123 Straight Street

Applicant city/state/zipcode: Anywhere MD 20852-4548

Applicant country: UNITED STATES

Applicant contact name: Evelyn Solano-martinez

Applicant contact title: OWNER

Export-Import Bank of the United States

ATTN: Credit Applications & Processing

811 Vermont Avenue, NW

Washington, DC 20571

EXIM Phone: 202-565-3800

EXIM Fax: 202-565-3675 & 202-565-3628

EXIM Email: exim.applications@exim.gov

Print

Where to find help while using EOL

The “Customer Service” button on the top right of the landing page provides access to comprehensive instructions on how to use all aspects of EOL. Click on the links on the left side of the page to open the associated content, which will appear on the right side of the page. There are also links to Frequently Asked Questions, and an opportunity to provide feedback on your EOL experience. The “Contact Us” section is used only to provide general feedback to EXIM Bank. DO NOT use this section to ask questions about the status of specific applications or policy related questions. Direct such questions to the appropriate loan officer.

